# Color Access Policy Manager

## User's Guide

59309701

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Color Access Policy Manager (CAPM) User's Guide

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## Notes

**NOTE**

**A note appears like this. A note provides additional information to supplement the main text which helps you to use and understand the product.**

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# Introduction

The Color Access Policy Manager (CAPM) utility allows you to monitor printer usage and control printing when used with compatible Oki printers.

Employ this utility to review recent printer usage and to configure printers with a policy that establishes printing privileges and restrictions based on applications, documents, URL's and user login names.

## To Open CAPM

Click Start > Programs > Okidata > Color Access Policy Manager > Color Access Policy Manager.

# System Requirements

The Color Access Policy Manager (CAPM) utility supports the following Microsoft® Windows operating systems, 32-bit versions only:

- Windows 2000
- Windows XP
- Windows Server 2003
- Windows Vista
- Windows Server 2008

*Administrator privilege is required*.

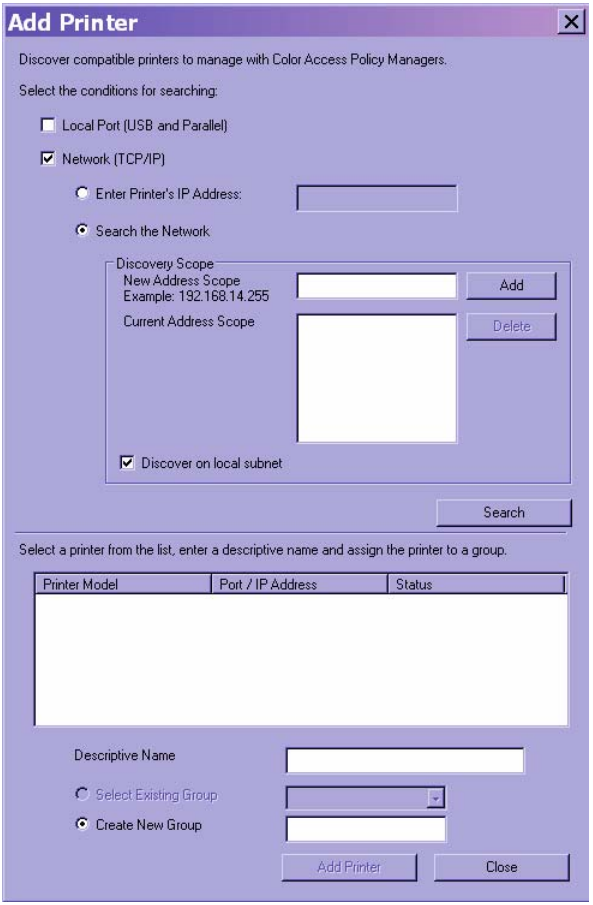
**NOTE**

**64-bit versions are not supported.**

## Add a Printer

To add a printer (or MFP—multi function product) to the list of managed devices.

1. In the Printer pull-down menu, click Add Printer.



**2.** Perform a search using the option you select.

- Local Port (USB and Parallel)

  Deselect the checkbox beside Network (TCP/IP) and click the checkbox beside Local Port, then click Search.

  CAPM searches for printers connected to the USB or Parallel port. Only printers that support Color Access Policy Managers will be discovered and displayed in the listbox.

- Network (TCP/IP), the default

  *Network Search Choices*

  - General Search

    Click Search.

    CAPM searches for printers connected on the TCP/IP network. Printers which support the CAPM utility are discovered and appear in the listbox. If the printer you want to add does not support the CAPM utility, it will not appear in the listbox.

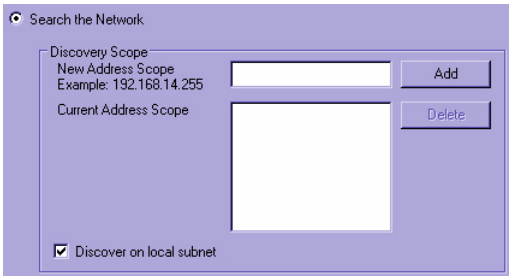
  - Enter Printer's IP Address (search by IP Address)

    Specify the IP address of the printer by typing it in the box.

    The printer's IP Address can be found by using the operator panel to review the printer's network settings: see your printer documentation for information on how to do this.

    Click Search.

  - Search the Network



> Select "Discover on local subnet" to search from Local Subnet (using 255.255.255.255), then click Search.

> To search for printers located in the different segments, type the broadcast address in "New Address Scope" (for example, 192.168.14.255) and click Add. Then click Search.

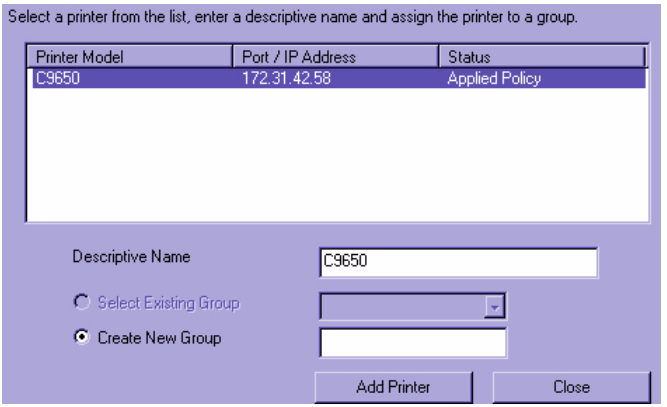
**NOTE**

**To delete a scope of search, select the address you want to delete from the "Current Address Scope" list and click Delete.**

*The printers that support the Color Access Policy Manager feature appear in the listbox, along with their IP address and Status, after a short period of time.*

**3.** Select the printer you want to use from the listbox.

> **NOTE**
> **If a printer supports the Color Access Policy Manager feature but does not appear in the list, confirm that the printer is Ready or on-line and properly connected, then click Search again.**




## Listbox Status Meanings

| Status | Meaning |
|---|---|
| No Policy | The printer is not managed by Color Access Policy Manager. |
| Applied Policy | The printer is managed by Color Access Policy Manager. |
| Policy Disabled | The printer is managed by Color Access Policy Manager but the policies for it are temporarily turned off. |
| Managed by Another Utility | The printer is managed by Another Utility. |

**4.** In the "Descriptive Name" box, enter a name of up to 32 characters to be displayed by CAPM when referencing the printer.

**5.** Next assign the printer to a group:

- Click "Select Existing Group", and choose from the list of the existing printer groups.

  *OR*

- Click "Create New Group" and type in the name of the group you want to add.

**6.** Click Add Printer.

- **If the printer is not already managed by the CAPM utility**:

  A message will appear asking if you want to manage it by Color Access Policy Manager.

  a.Click Yes.

  *A dialog box appears asking you to enter the printer's Administrator Password.*

  b.Type in the administrator password and click OK.

  *The printer added will now be managed by Color Access Policy Manager.*

- **If the printer is currently managed by Print Job Accounting**

  A message will appear asking if you want to manage it by the CAPM utility.

  a.Click Yes.

  *You will be requested to enter the printer's Administrator Password.*

  b.Type in the administrator password and click OK.

  *The Enter Job Accounting Server ID box appears.*

  c.Type in the Server ID and click OK.

  *The printer added will now be managed by the CAPM utility.*

**7.** To display the Job Accounting Server IDs, click "Server ID" in the Help menu of the Print Job Accounting software.

*A message appears asking if you want to delete Job Account ID. If you click OK, the Job Account ID is deleted*

## Delete a Printer

1. On the left side of the screen, select the group from the Group list and the printer to be deleted from the list.

2. In the Printer pull-down menu, select Delete Printer.

   *A message will appear asking if you want to continue.*

3. Click OK.

   *A message box appears asking you to confirm that CAPM will no longer manage the printer.*

4. Click Yes.

   *The "Enter Administrator Password" dialog box appears.*

5. Type in the printer's administrator password and click OK. The printer deleted will no longer be managed by Color Access Policy Manager.

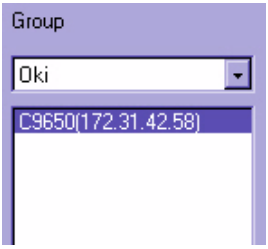
   *A message appears asking if you want to delete the policy in this printer.*

6. Click OK, to delete all the policies.

# Change Configuration

To change the Group, descriptive name or IP address for a printer:

1. On the left side of the screen, select the group from the Group list and the printer to be reconfigured.




2. In the Printer pull-down menu, select "Printer Properties".
3. Make your changes in the Printer Properties dialog box. If you do not want to change the configuration, click Cancel.
   - Group: select a group from the drop-down list.
   - Descriptive Name: up to 32 characters.
   - Change Address: click "Change Address" to change the port or the IP address for the printer.
4. Click OK.

# Delete a Group

**NOTE**

**Before deleting a Group, you must first remove all the printers assigned to the Group (see "Delete a Printer" above).**

1. On the left side of the screen, select the group from the Group list.

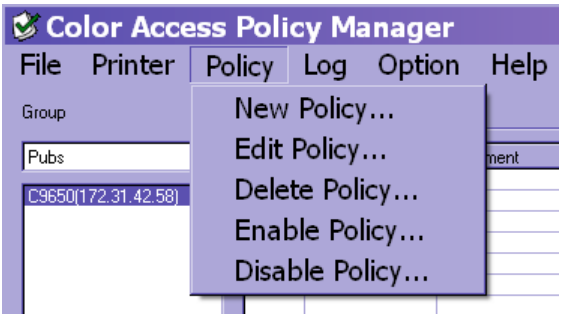
2. In the Printer pull-down menu, select "Delete Group".
2. Click Yes if you are sure you want to delete.

   *The Group is deleted.*

# Setting Up Policy

A Policy is used to set up and monitor/maintain profiles for individual users—or for individual computers—who will be sending jobs to the printer, It can also be used to restrict printing for a particular application or document.

Use the Policy drop-down menu to establish, edit, delete or enable/disable policies,




## New Policy

The new Policy dialog box has four tabs:

- **User Name**

  Up to 60 characters, for individual users identified by Login Name.

- **Application**

  For printing from specific applications.

- **Document**

  For printing a particular document.

- **Host Name**

  For individual computers, identified by Host Name.

Each tab allows the following printing parameters to be established:

- **Mono Only**

  Color printing is not allowed. If it can, the printer converts color jobs to monochrome before printing. Otherwise, color printing jobs are cancelled.

- **Color Permitted**

  Color printing is allowed.

- **No Printing**

  No printing at all is allowed.

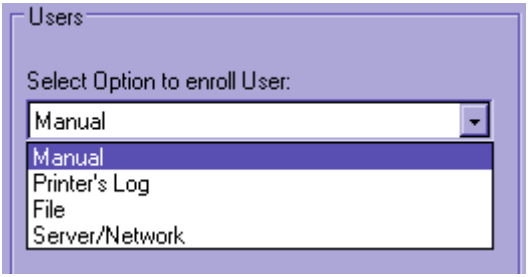
## Setting Up a New Policy

### For an individual user (User Name tab)

**NOTE**

**To set the general policy for unregistered users, click "OtherLoginNames" in the listbox to the right:**

1. From the Policy pull-down menu, select New Policy.
2. On the User Name tab, enter the User Name in one of four ways:



- **Manual**

  Type the person's Login name in the "Enter User Name" box.

- **Printer's Log**

  Click this to display the Job Log for the printer. Select the name from the User column.

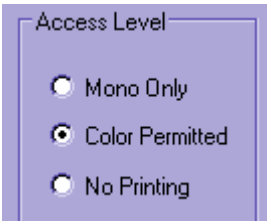
- **File**

  Select the file for importing the user name and click Open; the list of imported user names appears. The import file describes the user name for each user in a line. Select from the list the user name you want to add.

- **Server/Networks**

  Select the server for importing the user name; the list of imported user names appears. If you do not have access to importing the user name from the server, the Enter Password dialog box will appear. Select from the list the user name you want to add.

3. Select the radio button beside the Access Level you wish to establish:




4. Click Add.
5. Click Apply

   *The Select Printer dialog box appears.*

6. Add to the "Selected Printer" list a printer to which you wish to apply the new policy.

**NOTE**

**To add a printer to the "Selected Printer" list, select its Group from the Group list, then select the printer or printers from the Printer list. Click Add.**
**To delete a printer from the "Selected Printer" list, select it (you can select more than one) and click Delete.**

7. Click Apply.

   *The confirmation message appears.*

**NOTE**

**For the meaning of the information in the Status column, see the "Policy Status Messages" table on page 27.**

8. Click OK,

   *The "Enter Administrator Password" dialog box appears.*

9. Type in the printer's administrator password and click OK.

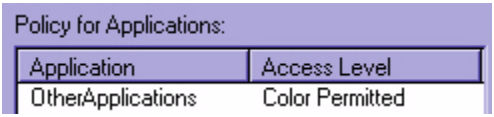
   *The policies will be applied to the printers in the "Selected Printer" list.*

10. Click Close.

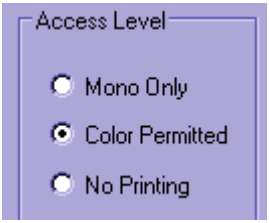
### For an Application (Application tab)

**NOTE**

**To set the policy for unregistered applications, click "OtherApplications" in the listbox to the right:**




1. From the Policy pull-down menu, select New Policy.
2. On the Application tab, enter the application name either by typing it manually (up to 60 characters) in the "Enter Application Name" box, or by selecting it from the Printer's Log listbox.
3. Select the radio button beside the Access Level you wish to establish:




4. Click Add.
5. Click Apply

   *The Select Printer dialog box appears.*

**NOTE**

**For the meaning of the information in the Status column, see the "Policy Status Messages" table on page 27.**

6. Add to the "Selected Printer" list a printer to which you wish to apply the new policy.

**NOTE**

**To add a printer to the "Selected Printer" list, select its Group from the Group list, then select the printer or printers from the Printer list. Click Add.**
**To delete a printer from the "Selected Printer" list, select it (you can select more than one) and click Delete.**

7. Click Apply

   *The confirmation message appears.*

8. Click OK,

   *The ""Enter Administrator Password" dialog box appears.*

9. Type in the printer's administrator password and click OK.

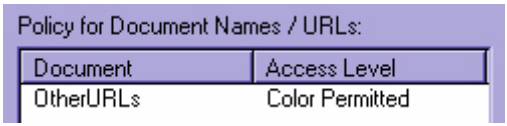
   *The policies will be applied to the printers in the "Selected Printer" list.*

10. Click Close.

### For Specific Documents (Document tab)

**NOTE**

**To set the policy for unregistered documents, click "OtherURLs" in the listbox to the right:**



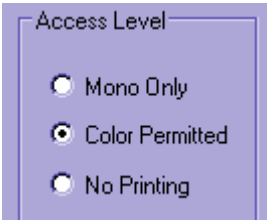

1. From the Policy pull-down menu, select New Policy.
2. On the Document tab, enter the document name either by typing it manually (up to 80 characters) in the "Enter

Document Name / URL" box, or by selecting it from the Printer's Log listbox.Incude the file name extension (e.g., ".doc") in the name. You can use the Asterisk symbol (*) as a wild card.

**NOTES**

**Use of * elsewhere or ** is not acceptable as a wild card.**
**Document names are *not* case sensitive.**

3. Select the radio button beside the Access Level you wish to establish:




4. Click Add.
5. Click Apply

   *The Select Printer dialog box appears.*

**NOTE**

**For the meaning of the information in the Status column, see the "Policy Status Messages" table on page 27.**

6. Add to the "Selected Printer" list a printer to which you wish to apply the new policy.

> **NOTE**
>
> **To add a printer to the "Selected Printer" list, select its Group from the Group list, then select the printer or printers from the Printer list. Click Add.**
> **To delete a printer from the "Selected Printer" list, select it (you can select more than one) and click Delete.**

7. Click Apply

   *The confirmation message appears.*

8. Click OK,

   *The "Enter Administrator Password" dialog box appears.*

9. Type in the printer's administrator password and click OK.

   *The policies will be applied to the printers in the "Selected Printer" list.*

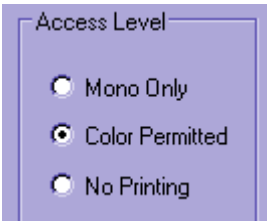
10. Click Close.

### For Individual Computers (Host Name tab)

> **NOTE**
>
> **To set the policy for unregistered computers, click "OtherHostNames" in the listbox to the right:**

1. From the Policy pull-down menu, select New Policy.

2. On the Host Name tab, enter the computer's host name either by typing it manually (up to 60 characters) in the "Enter Host Name" box, or by selecting it from the Printer's Log listbox
3. Select the radio button beside the Access Level you wish to establish:




4. Click Add.
5. Click Apply

*The Select Printer dialog box appears. Add to the*

**NOTE**

**For the meaning of the information in the Status column, see the "Policy Status Messages" table on page 27.**

*"Selected Printer" list a printer to which you wish to apply the new policy.*

**NOTE**

**To add a printer to the "Selected Printer" list, select its Group from the Group list, then select the printer or printers from the Printer list. Click Add.**
**To delete a printer from the "Selected Printer" list, select it (you can select more than one) and click Delete.**

6. Click Apply

*The confirmation message appears.*

7. Click OK,

   *The "Enter Administrator Password" dialog box appears.*

8. Type in the printer's administrator password and click OK.

   *The policies will be applied to the printers in the "Selected Printer" list.*

9. Click Close.

## Edit a Policy

> **NOTE**
>
> **For the meaning of the information in the Status column, see the "Policy Status Messages" table on page 27.**

1. Select from the Group list the group to which the printer belongs, then select from the Printer list the printer which contains the policy you want to edit.
2. In the Policy drop-down menu, select Edit Policy.

   *The Policy dialog box displays the policy acquired from the printer.*

3. Click the tab for which you wish to make changes.
4. In Policy listbox on the right, select the Login Name, Application, Document Name/URLs or Host Name for which you wish to make changes.
5. Click the radio button for the revised type of access you want, then click Change.
6. CLick Apply.
7. Select the appropriate Group from the Group drop-down list, then click the appropriate printer(s) from the listbox.
8. Click Add.

   *The printer(s) appear in the Selected Printer listbox on the right.*

9. Click Apply. then click OK

10. Type in the printer's administrator password and click OK.

    *Policy Applied appears in the Status column of the listbox.*

11. Click Close yo go back to the Policy dialog box.
12. To make additional changes, click another tab. If you are through making changes, click Close.

## Delete a Policy

**NOTE**

**For the meaning of the information in the Status column, see the "Policy Status Messages" table on page 27.**

1. In the Policy drop-down menu, select Delete Policy.

   *The Select Printer dialog box appears.*

2. Select the appropriate Group from the Group drop-down menu, then in the listbox select the printer(s) you wish to delete and click Add.

   *The printer(s) appear in the "Selected Printer" listbox on the right.*

3. Select the printer(s) in the "Selected Printers" listbox that you wish to disable, then click Delete.

   *The selected printer(s) disappear from the listbox.*

4. Click Close.

## Temporarily Disable a Policy

**NOTE**

**For the meaning of the information in the Status column, see the "Policy Status Messages" table on page 27.**

To temporarily turn off the policies for a selected printer:

1. In the Policy drop-down menu, select Disable Policy.

   *The Select Printer dialog box appears.*

2. Select the appropriate Group in the Group drop-down list, then in the listbox select the printer(s) for which you wish to temporarily disable the Policy settings. Click Add.

   *The printer(s) appear in the "Selected Printer" listbox on the right.*

3. Select the printers in the "Selected Printers" listbox that you wish to disable, then click Apply.

   *The confirmation message appears.*

4. Click OK.

   *The "Enter Administrator Password" dialog box appear*

5. Type in the printer's administrator password and click OK.

   *The policies of the printers in the [Selected Printer] list change Status to Policy Applied.*

6. Click Close.

## To Re-Enable Policies

**NOTE**

**For the meaning of the information in the Status column, see the "Policy Status Messages" table on page 27.**

To turn back on the policies that have been temporarily turned off for a printer or printers:

1. In the Policy drop-down menu, select Enable Policy.
   *The Select Printer dialog box appears.*
2. Select the appropriate Group in the Group drop-down list, then in the listbox select the printer(s) for which you wish to re-enable the Policy settings. Click Add.
   *The printer(s) appear in the "Selected Printer" listbox on the right.*
3. Select the printers in the "Selected Printers" listbox that you wish to re-enable, then click Apply.
   *The confirmation message appears.*
4. Click OK.
   *The "Enter Administrator Password" dialog box appear*
5. Type in the printer's administrator password and click OK.
   *The policies of the printers in the "Selected Printer" list change Status to Policy Applied.*
6. Click Close.

## Status

Below are the possible status messages when applying a policy.

**Policy Status Messages**

| Status | Meaning |
|---|---|
| Not Applied | The policy has not been applied to the printer. |
| Now Applying | The policy is now applying to the printer. |
| Policy Applied | The policy has been applied to the printer. |
| Communication Error | When the utility was attempting to apply the policy, communication with the printer failed. |
| Incorrect password | The administrator password entered for the printer is incorrect. |
| Too many items | The policy has too many items. |

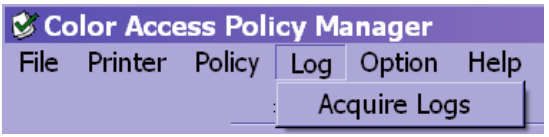
## Acquire Logs

### To acquire the job log for a printer:

**NOTE**

**Acquiring a job log for a printer generates a report of the most recent jobs sent to that printer. The default number of jobs to be acquired is 100, but any number from 1 to 1000 can be specified (see below),**

1. Select the appropriate Group from the Group drop-down list, then in the listbox select the printer whose log you wish to acquire.
2. In the Log drop-down menu, click Acquire Logs.




*A message confirming that the logs have been successfully acquired will be displayed.*

*The job log for that printer will appear in the CA{M window.*

### To change the number of logs acquired:

1. In the Option drop-down menu, click Setup….
   *The Setup dialog box appears.*

2. Type in the maximum number of logs to be acquired (from 1 to 1000). and click OK.

> **NOTE**
>
> **Some printers have less memory available for storing job logs and may not be able to provide the maximum number of job logs specified.**

## Display Log

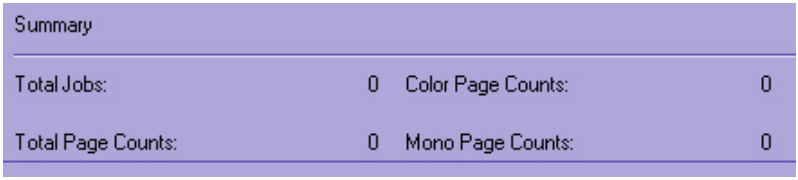
To display the latest job log acquired from a printer, select the appropriate Group from the Group drop-down list, then in the listbox click the printer whose log is to be displayed. "

> **NOTE**
>
> **There are items that are not supported by some printers and drivers. The column below any item that is not supported will be left blank.**

| Item | Meaning |
|---|---|
| # | Log ID |
| User | User name |
| Document | Name of the document printed. |
| Application | Name of the application used for printing.<br>Note that some applications do not report their name, or may provide a different name for different versions of the application. Document names and file extensions can also be used to establish rules for applications, For example, *.pdf can be used as a Document name for jobs printed from Acrobat Reader. |
| Host | Name of the host computer from which the print job was sent. |
| Page | Number of pages printed (A4/Letter size equivalence). |

| Item | Meaning |
|---|---|
| Color | Number of pages printed in color (in A4/Letter size equivalence). |
| Mono | Number of pages printed in monochrome (in A4/ Letter size equivalence). |
| Date/Time | Time when the printer finished printing. |

At the bottom of the CAPM screen there is a Summary of jobs printed for the selected printer. "




| Item | Meaning |
|---|---|
| Total Jobs | Total of acquired logs |
| Total Page Counts | Total pages printed, from the logs acquired (in A4/Letter size equivalence) |
| Color Page Counts | Total pages printed in color, from the logs acquired (in A4/Letter size equivalence) |
| Mono Page Counts | Total pages printed in monochrome, from the logs acquired (in A4/Letter size equivalence) |
| A4 Equivalence (see below) | Convert the size of paper actually printed into A4 equivalence. |

## A4 Equivalences

| Paper Size | A4 Equivalence |
|---|---|
| Letter | 1 |
| Executive | 1 |
| Legal14 | 1 |
| Legal13.5 | 1 |
| Legal13 | 1 |
| Tabloid Extra | 2 |
| Tabloid | 2 |
| A3Wide | 2 |
| A3 | 2 |
| A4 | 1 |
| A5 | 1 |
| A6 | 1 |
| B4 | 2 |
| B5 | 1 |
| Com-9 Envelope | 1 |
| Com-10 Envelope | 1 |
| Monarch Envelope | 1 |
| DL | 1 |
| C6 | 1 |
| C5 | 1 |
| C4 | 1 |
| Postcard | 1 |
| Double postcard | 1 |
| Index Card | 1 |
| Custom (210 mm or shorter) | 1 |
| Custom (longer than 210 mm) | 2 |